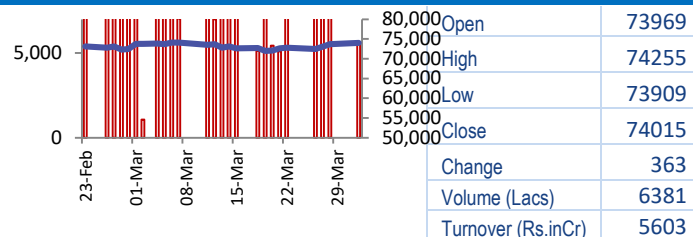
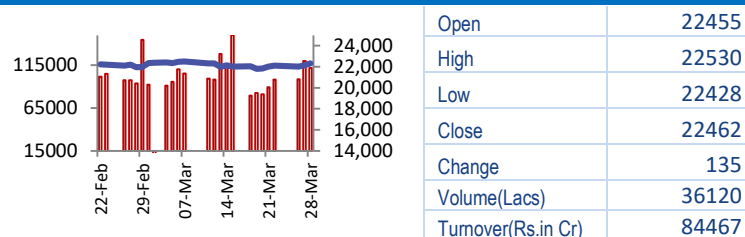


BSE



NSE



World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	39567	39807	(240)	-0.6%
Dow Futures	39774	39894	(120)	-0.3%
Nasdaq	16397	16379	18	0.1%
FTSE	7953	7953	Closed	Closed
Nikkei	39853	39803	50	0.1%
Hang Seng	16945	16541	404	2.4%
Gift Nifty	22543	22608	(65)	-0.3%
Straits Singapore	3246	3235	11	0.3%
South Korea	2758	2748	10	0.4%
Taiwan	20420	20222	198	1.0%
Shanghai	3074	3077	(3)	-0.1%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	8951	8867	84.0	0.9%
Alumin (\$/MT)	2335	2337	(2.0)	-0.1%
Zinc (\$/MT)	2457	2439	18.0	0.7%
Brent Crude (\$/bbl)	88.0	87.0	1.0	1.1%
Gold (\$/Ounce)	2254	2251	3.0	0.1%
Silver (\$/Ounce)	25.0	25.0	0.0	0.0%
Light Crude (\$/bbl)	84.0	84.0	0.0	0.0%
N G (\$/mmbtu)	2.0	2.0	0.0	0.0%
Sugar (\$/MT)	653.0	646.0	7.0	1.1%
Rubber (Rs./kg)	183.5	182.8	0.8	0.4%
Baltic Dry Index	1821	1845	(24.0)	-1.3%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	83.40	83.38	0.02%
Rs./ Euro	89.87	90.28	-0.45%
Rs./Chinese Yuan	11.53	11.60	-0.60%
Yen /\$ rate	151.67	151.65	0.01%
\$ US/Euro	1.07	1.07	0.00%

Dollar Index	Current	Previous	Var(%)
Dollar Index	105.04	105.02	0.02%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	22400	47740
Support 2	22340	47540
Resistance	22540	48000

Securities in Ban For Trade
NIL

Market Review

US: US markets fell after displaying their best performance since 2019 over the past week. This decline came as stronger-than-expected manufacturing data weighed in on fears that there will be no rush in the Fed Reserve's rate cuts for the year.

Asia: Asian stocks rose on Tuesday and the dollar firmed, keeping the yen pinned near the 152-per-dollar levels that has traders worried about possible intervention, as expectations that the Fed Reserve was close to cutting interest rates faded.

India: Sensex ended in positive territory, with gain led by Large-cap and Mid-cap stocks. Bank Nifty index ended higher by 453.65 points or 0.96% to settle at 47,578.25. Media and Realty stocks outperformed among the other sectoral indices while FMCG and Auto stocks shed. **Market is expected to open on flattish note and likely to witness sideways move during the day.**

Global Economy: U.S. manufacturing grew for the first time in 1-1/2 years in March as production rebounded sharply and new orders increased, but employment at factories remained subdued amid "sizable layoff activity" and prices for inputs pushed higher. The survey from the Institute for Supply Management (ISM) suggested the sector, which has been battered by higher interest rates, was on the mend, though risks remain from rising raw material prices. Timothy Fiore, who chairs the ISM's manufacturing business survey committee, said "demand remains at the early stages of recovery, with clear signs of improving conditions."

U.S. construction spending unexpectedly fell in Feb as strength in single-family homebuilding was more than offset by weaknesses in non residential and public projects. The Commerce Department said that construction spending dropped 0.3% after an unrevised 0.2% decline in Jan.

Commodities: Gold prices held steady on Tuesday backed by lower U.S. Treasury yields, after touching a record high in the previous session on growing expectations that the Reserve would cut interest rates for the first time in June.

Oil prices gained in early Asian trading on Tuesday, underpinned by signs of improved demand and escalating Middle East tensions that had sparked a rally in U.S. futures to a five-month high in the previous session.

Currency: The dollar rose on news that the U.S. manufacturing sector grew in March for the first time since September 2022, while the yen lingered below 152 per dollar over the threat of intervention by the Bank of Japan.

FII Derivative Transactions (Rs. Cr)

Contracts	Purchase		Sell		Net	Open Interest (OI)		OI (Previous day)		Change	
	Contract	Value	Contract	Value		Contract	Value	Contract	Value	Contract	Value
Index Future	42378	4191	40114	3915	276	239225	22157	230791	21381	8434	776
Index Option	16987294	1452486	17088438	1459551	(7065)	3529045	320281	2822904	253501	706141	66780
Stock Future	234099	19962	220129	18942	1020	3103930	256158	3081022	251295	22908	4863
Stock Option	388424	34690	383789	34288	402	158672	13837	47589	4098	111083	9739
Total	17652195	1511329	17732470	1516696	(5367)	7030872	612433	7482589	682236	(451717)	82158

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
21-Mar-24	11258	13500	(2243)
22-Mar-24	14476	15803	(1327)
26-Mar-24	16805	20677	(3871)
27-Mar-24	20870	24041	(3171)
28-Mar-24	19965	15922	4043
Month to date-Mar	370433	339651	30783
FII (Prov.) (Rs Cr)	Buy	Sell	Net
22-Mar-24	17460	20770	(3310)
26-Mar-24	22714	22704	10
27-Mar-24	19559	17388	2170
28-Mar-24	24809	24620	188
1-Apr-24	8818	9340	(522)
Month to date- Mar	374211	371419	2792
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
22-Mar-24	12729	8964	3765
26-Mar-24	14130	9106	5024
27-Mar-24	26387	25189	1198
28-Mar-24	12428	9737	2692
1-Apr-24	10193	8985	1208
Month to date-Mar	256445	198925	57520
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
21-Mar-24	4386	2227	2159
22-Mar-24	1920	978	941
26-Mar-24	531	4075	(3545)
27-Mar-24	3610	1127	2482
28-Mar-24	3517	2076	1441
Month to date-Mar	42385	29590	12795

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	3212	79%	2279	85%
Decline	698	17%	331	12%
Unchanged	148	4%	57	2%

Market Turnover	01-Apr	28-Mar	Var (%)
BSE Cash	5603	8970	-38%
NSE Cash	84467	111697	-24%
NSE Futures	140376	349890	-60%
NSE Options	21088832	49310639	-57%
Total (Rs.Cr)	21319278	49781196	-57%

Volatility Index	01-Apr	28-Mar
Volatility Index	12.08	12.83

Index PE - TTM	01-Apr	Yr. High	Yr. Low
Sensex	25.3	26.0	22.0
Nifty	23.0	28.8	20.1

Corporate News

Aditya Birla Fashion aims to demerge Madura Fashion business into separate listed entity

ABFRL has authorised the management of the company to evaluate the vertical demerger of Madura Fashion & Lifestyle business from ABFRL into a separate listed company. The proposed demerger will enable the creation of two separately listed companies as independent growth engines with distinct capital structures and parallel value creation opportunities. (BS)

IRB Infrastructure Trust SPVs make payment of Rs 6,111 crores to NHAI for TOT projects

The SPVs made an upfront payment of the concession fee of Rs 6,111 crore to the NHAI (TOT12 - Rs 4,428 crore, TOT 13 - Rs 1,683 crore) and subsequently received the appointed dates from NHAI for both projects. IRB Lalitpur Lakhnadon Tollway Pvt. Ltd representing TOT 12 project, IRB Kota Tollway Pvt Ltd. and IRB Gwalior Tollway Pvt. Ltd. representing TOT 13 bundle, have started tolling w.e.f. the 00.00 Hrs. on 1st April 2024. (ET)

Jio cements market lead with 4.18 mn mobile subscriber addition in January

Reliance Jio added 4.17 million mobile subscribers in January 2024, according to data released by the TRAI. Bharti Airtel upped its wireless subscriber count by 752,000, taking its mobile tally to 382.4 million in January. Vodafone Idea continued to bleed on the subscriber front, and the troubled telco lost 15.2 lakh wireless subscribers. Its mobile subscriber base stood at 221.5 million in January, as per TRAI data. (BS)

Economy

Indian arms exports touch record Rs 21,083 cr in FY24: Ministry of Defence

India's defence exports have scaled "unprecedented heights", crossing over ₹21,000 cr for the first time in the history of independent India, Rajnath Singh said. Defence exports saw a spectacular growth of 32.5 per cent over the previous fiscal. The domestic defence industry, including both the pvt sector and defence public sector undertakings, made tremendous efforts towards achieving the "highest-ever defence exports". (BS)

International

OpenAI removes Sam Altman's ownership of its Startup Fund

OpenAI has changed the governance structure of its venture capital fund that backs AI startups, so its high-profile chief executive Sam Altman no longer owns or controls the fund. The change came after Altman's ownership of the OpenAI Startup Fund raised eyebrows for its unusual structure, while being marketed similar to a corporate venture arm, the fund was raised by Altman from outside limited partners and he made investment decisions. (ET)

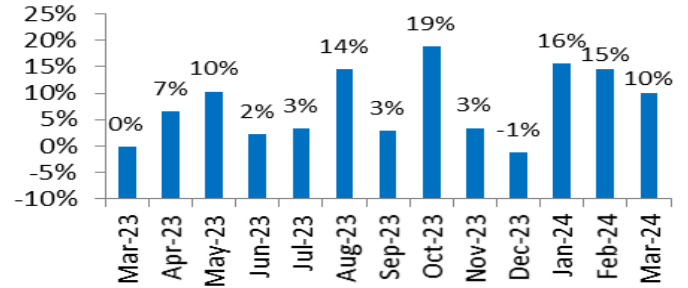
Top 5 Nifty Gainers	01-Apr	28-Mar	Var(%)
JSWSTEEL	872	830	5.0%
TATASTEEL	163	156	4.7%
DIVISLAB	3568	3445	3.6%
ADANI PORTS	1376	1342	2.5%
UPL	466	456	2.2%
Top 5 Nifty Losers	01-Apr	28-Mar	Var(%)
EICHERMOT	3947	4019	-1.8%
TITAN	3738	3802	-1.7%
NESTLEIND	2586	2622	-1.4%
BAJAJ-AUTO	9042	9148	-1.2%
LTIM	4883	4938	-1.1%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	74015	0.5%	1.9%	0.3%	25.5%
MIDCAP	39968	1.6%	3.4%	0.0%	66.1%
SMLCAP	44455	3.0%	5.0%	-3.0%	64.9%
AUTO	49020	-0.2%	3.2%	2.1%	73.5%
BANKEX	53897	0.7%	1.8%	0.3%	17.1%
Capital Goods	61992	1.7%	6.8%	4.8%	80.4%
FMCG	19356	0.2%	1.2%	-1.4%	17.4%
Health Care	35473	1.2%	4.1%	1.5%	62.1%
IT	35810	0.5%	-2.0%	-6.5%	25.7%
METAL	29151	3.4%	5.5%	3.0%	51.9%
Oil & Gas	27793	0.5%	2.6%	-2.0%	59.9%
Power	6839	2.1%	5.1%	2.0%	89.7%
Realty	7406	4.2%	9.2%	1.4%	138.8%

NSE USD Futures	01-Apr	28-Mar	Var (%)
March Expiry (Rs./\$)	N.A.	83.38	0.0%
April Expiry (Rs./\$)	N.A.	83.39	0.0%
Total Turnover (Rs. Crore)	N.A.	39990	0%

Sectors	TTM PE
Auto	32.2
Auto Ancillary	44.5
Banking	15.87
Engineering	39.81
Cement	83.26
Diamonds & Jewellery	42.3
Housing Finance	19.81
Infrastructure & Const	32.43
Metals-Aluminium	42.96
Metal - Steel	16.75
Oil Expl.	17.66
Pharma	12.67
Power – Gen. Supp.	46.76
Information Tech.	20.53
Sugar	13.51
Telecom Serv. Prov.	82.48
Tyres	26.18

Maruti Monthly Volume Growth (YoY)
(Source: Company data)



10 year G-Sec Yield	Current	Previous	Change
US	4.30%	4.31%	(1) bps
Japan	0.75%	0.74%	1 bps
India	7.06%	7.07%	(1) bps
UK	3.93%	3.93%	0 bps
Libor 3 Mths	5.56%	5.56%	0 bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	525	528	-0.7%
Inflation - WPI	0.20%	0.27%	(7) bps
Inflation - CPI	5.09%	5.10%	(1) bps

India GDP	Q3FY24	Q2FY24	Var(%)
Growth	8.36%	7.60%	76 bps

Monetary Policy	Current	Previous	Change
Repo Rate	6.50%	6.50%	0 bps
Reverse Repo Rate	3.35%	3.35%	0 bps
CRR	4.50%	4.50%	0 bps
O/S Banking System Liquidity (Rs bn)	-620	-622	1.2

IIP Growth %	Jan-24	Jan-23	Apr-Feb
IIP	3.8	5.8	6.0
Mining	5.9	9.0	8.5
Manufacturing	3.2	4.5	5.7
Electricity	5.6	12.7	7.0

Bulk Deal As On 01/04/24

BSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
543319	AAPLUSTRAD	ANILKUMAR BHAGWANJI LALCHETA	B	48000	10.63
539621	BCLENTERPR	ANIL GUPTA	S	600000	1.08
524606	BERLDRG	HINDON TRADERS & BROKERS PRIVATE LIMITED	S	85000	28.52
524606	BERLDRG	SAMIR NARENDRA GUPTA	B	91007	28.78
511634	DUGARHOU	RUCHIRA GOYAL	B	15140	9.62
511634	DUGARHOU	VINOD KUMAR ARORA	S	15100	9.62
531911	GALAGEX	HARSHA MANHARBHAI SADARIA	S	45000	47.86
531911	GALAGEX	MANUBHAI AMRUTLAL SHAH	S	13830	52.4
539228	GGPL	HDFC BANK LIMITED	S	289907	2.84
542918	GIANLIFE	ARUN KUMAR GUPTA	S	100000	22.67
524614	INDXTRA	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	299791	7.8
540696	KCDGROUP	NIMESH BIPIN SANGHRAJKA	S	259841	8.91
540696	KCDGROUP	SANJEEV GORWARA	B	195000	8.96
521238	KDL	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	5221	151.75
530547	KENFIN	SULOCHANA DEVI	S	29000	12
530547	KENFIN	SUMANCHEPURI	B	30755	12
539910	KOCL	DREAMBULLS PARTNERS PRIVATE LIMITED .	B	152000	1.66
539910	KOCL	JAYSHREEBENJAYESHBHAIMISTRI	B	125000	1.65
539910	KOCL	PAVANKUMARKARALAPATI	S	82276	1.65
539910	KOCL	SWAPNA KOCHHAR	S	600011	1.65
539910	KOCL	THAKORBHAVINUBHAIMISTRY	S	4080	1.8
539910	KOCL	THAKORBHAVINUBHAIMISTRY	B	180158	1.65
544139	KOURA	MANSI SHARE & STOCK ADVISORS PRIVATE LIMITED	S	22000	54.14
523862	PIFL	B.M. HOUSE (INDIA) LIMITED	S	43160	14.7
523862	PIFL	BABITA JAIN	B	25600	14.7
523862	PIFL	PHOOL DEVI GHOSAL	B	22600	14.64
531893	SAWABUSI	AMRIT SEGHAL	S	607561	1.18
531893	SAWABUSI	SHUBHAM ASHOKBHAI PATEL	B	1081843	1.19
543515	SEML	MAHESHKUMAR GORDHANBHAI PATEL	B	76000	103.36

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
ARSHIYA	Arshiya Limited	ANKITA VISHAL SHAH	BUY	1476341	5.9
HCC-RE	Hindustan Construction Co	MANSI SHARE AND STOCK ADVISORS PVT LTD	BUY	1988867	11.83
INDSWFTLAB	Ind-Swift Labs Ltd.	EC SPECIAL SITUATIONS FUND	SELL	1470708	100.56
INDSWFTLAB	Ind-Swift Labs Ltd.	EISAF II ONSHORE FUND	SELL	434111	100.62
INSPIRE	Inspire Films Limited	RASHI EQUISEARCH PVT LTD	SELL	90000	31.25
JSL	Jeena Sikho Lifecare Ltd	AJAY KUMAR AGGARWAL	BUY	124920	876.36
KRIKA	Kritika Wires Limited	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	BUY	1525313	15.95
CBAZAR	Net Avenue Technologies L	PRAKASH PARAKH AND SONS HUF	BUY	112000	22.73
PATINTLOG	Patel Integrated Logistic	R CHANDRASEKAR	BUY	388952	21.67
SATINDLTD	Sat Industries Limited	SOCIETE GENERALE	BUY	700000	93.1
SIGNORIA	Signoria Creation Limited	ASHWIN STOCKS AND INVESTMENT PRIVATE LIMITED	BUY	24000	176.55
SURAJEST	Suraj Estate Developers L	BNP PARIBAS ARBITRAGE	SELL	222000	302.97
VISHWAS	Vishwas Agri Seeds Ltd	BABUBHAI BHIMJIBHAI GAJERA	BUY	67200	84.55
VISHWAS	Vishwas Agri Seeds Ltd	NIRALI YAYAATI NADA	BUY	59200	84.97
VISHWAS	Vishwas Agri Seeds Ltd	SATYA VIBHU MUPPANA	BUY	56000	85
VISHWAS	Vishwas Agri Seeds Ltd	VIPUL HARIDAS THAKKAR	BUY	64000	80.75
VISHWAS	Vishwas Agri Seeds Ltd	YAYAATI MARKETING PRIVATE LIMITED	BUY	52800	83.55

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Nirmal Bang Research (Division of Nirmal Bang Securities Pvt. Ltd.)

B-2, 301/302, Marathon Innova,
Opp.Peninsula Corporate Park
Off. Ganpatrao Kadam Marg
Lower Parel(W), Mumbai-400013
Board No. : 91 22 6723 8000/8001
Fax. : 022 6723 8010